As an independent Registered Investment Advisor, we have no proprietary investments to sell, nor have any incentive to recommend funds that do not fully benefit our clients. But unlike most independent firms, we have not set any limits for ourselves. Our Visionaries have access to the whole world of investment choices. Every recommendation we make is specific and personal to the client, based on their unique situation and life goals. Beyond financial planning, our Visionaries will work as your advocate for growing your wealth, and as your financial concierge to make it easier for you to achieve your financial goals, and to enjoy the journey along the way.
At Visionary, we build NEW DAWNS rooted in trust to create confidence that we have your tomorrow covered.

Visionary Wealth Advisors is an independent Registered Investment Advisor that offers objective financial expertise & portfolio management services. We deliver an open architecture of comprehensive products and resources that allow us to customize a solution that fits your needs. These resources include Equities, Fixed Income, Mutual Funds, Exchange-Traded Funds, and Managed Accounts. Being truly independent, we have no proprietary products to recommend or pressure to follow a pre-set agenda.
We understand that wealth is measured by respect for you, for your values and results that reflect your desires, not ours.

Our visionaries see investment management as much more than growing wealth. We see it as a means to empower and accomplish your most important goals. We challenge our clients to think bigger and grow their wealth beyond all expectations, and use their prosperity to live their values.
We foster your life’s work through disciplined passion so that your faith is rewarded today and beyond.

To create your inheritance, we work to build, preserve, and protect your wealth through innovative investment allocations, tax strategies, risk management, and philanthropy. We have an internal Think Tank and Investment Committee, made up of senior level Wealth Management Advisors, Portfolio Managers, and Analysts, who relentlessly watch over our clients’ investment allocations to ensure they are on track with their goals.
SERVANT LEADERSHIP

serves the good of the whole.

The Visionary Think Tank provides in-depth research for our Visionaries and manage the assets of the firm. They developed and follow a disciplined research process that covers numerous criteria, all for the purpose of ensuring client assets are allocated properly to meet their goals. We meet daily to review client portfolios and to discuss investment strategies with our Visionaries. This team approach means every Visionary client has highly experienced Certified Financial Planners and Portfolio Managers working in their best interest to help them build wealth and achieve or exceed their goals.
spreadsheet is your life

that will have peaks and valleys, so it is our duty to anticipate both the known and unknown and find potential in both to transform your fear into confidence.

Our Visionaries see beyond the ideal vision of your retirement life, and also consider any life-changing events that may be ahead. An innovative retirement plan will keep you on your path to your life goals, regardless of what adversities may arise in the future. Your values are personal and unique, and are what guide your life and every decision you make. Once we understand what you truly value, we can define specific financial goals and objectives to ensure you can achieve what is most important to you.
WE LOOK TO THE HORIZON,
not just the near at hand.

Our Visionaries will help you articulate your values and help you envision the legacy you wish to leave by building an estate plan for you. We will manage your investments and facilitate creating your wills, trusts and other vital documents. Your estate plan will not gather dust, but will be evaluated annually, or as needed, so that when you leave this world, all your wishes will be current. This in itself is a tremendous gift to your family.
We empower you to see your future before it is your future - to believe it - to attack it and we get it done so that you realize all your possibilities.

We can help your small or medium size business attract & retain quality employees through a customized employee retirement plan. Based on the size & makeup of your company, we can develop an appropriate plan design & coordinate administrative functions with local third party administrators.
ENLARGE YOUR FAITH.

Values Based Wealth Management is exactly that - a faith multiplier that translates into a portfolio of prosperity because it is built around your convictions - not ours.

The Visionary Family Office is built on the idea that families do not have to fail; that wealth does not have to be a burden; that you can construct a plan that provides you with the freedom to pursue your passions; and that proactive steps can be taken to minimize risk and take advantage of opportunities. Our team provides services within a collaborative environment, looking at the future as an opportunity for positive change, with the family’s finances as well as the family entity. In doing so, we uncomplicate the complicated and increase the family’s confidence that all is in order and no balls will be dropped. Ultimately, we are here to help families be successful in the short and long-term, and give family members more time to focus on each other and their unique passions.
WE ARE WITH YOU

We are the hand in the small of your back that say’s let’s go, you can do this. We got this - always beside you building a better tomorrow for you.

Visionary Mergers & Acquisitions helps clients continue the legacy they built. By navigating complexity and removing barriers, Visionary Mergers & Acquisitions ensures business owners get the best value and find the right buyer. We guide our clients through the entire process of buying or selling a business.
Passion only means something when you have compassion for others. Any company can check the box and write a check to charity. We build giving into each action we take - founding SWING FOR HOPE and NEIGHBORS IN NEED - we work, we give, we grow by paying it forward each day.

WEALTH IS measured by OUR ACTIONS.
VALUES

Faith
We have faith in God to guide us and give us the courage to make the right choices, even if what’s right is not the easiest choice. We have faith in each other, and we will always maintain a culture that is supportive and desiring of success for each other.

Integrity
The firm will act with the highest degree of integrity in all that we do. We will maintain a culture that expects and honors good morals, honesty, trust and uncompromising ethics.

Excellence
We will exceed expectations in all that we do. We will be continuous students of our industry to stay on the cutting edge of financial solutions and technology. We will provide relentless service to our clients, always putting their needs first.

Growth
We will proactively seek to grow in all areas – personally, professionally and spiritually as individuals and as a firm. We will embrace change and serve as leaders to our clients and the community.

Community
Our firm will actively engage in philanthropy. We recognize that we are blessed in many ways and will give generously of our time, talent and treasure for the good of the communities we serve.

that MATTER.
It’s true, we are independent financial wealth advisors who grow your wealth through an ethical fee based management. And we do that well. But even more than that - we think about and plan your future with imagination, wisdom, care and vision.